

PureWealth

Integrate your client relationship information with their financial data and reap the rewards.



OVERVIEW

Is your client data scattered across a host of systems and filing cabinets? Are you supplementing your Portfolio Management System with spreadsheets and notepads? Is crucial client information locked away in personal emails and inside the heads of your staff? Take control of your client data with PureWealth.

PureWealth is a CRM system that consolidates your client data and integrates it with your Portfolio Management System to make all of your customer data work to your advantage.

PureWealth is also the keystone of the PureFacts Wealth Management Suite, the comprehensive solution for your Wealth Management business. Along with the PureFacts modules for Portfolio Modeling, Fee Calculation, Performance, and Statements, PureWealth provides wealth management professionals with the framework for improving performance and client service while managing growth.

A CRM BUILT FOR WEALTH MANAGERS

PureWealth is an integrated contact management system designed for Wealth Managers. Not only does it do everything you expect from a standard CRM application (schedule meetings, do mail merges, track client contacts, and save key client information), it also includes key built-in customizations for Wealth Managers such as portfolio views, transaction summaries, KYC fields, and client reports. In just a few clicks you can run a benchmark exception report or print off an up-to-the-minute client statement.

FIND ALL OF YOUR KEY DATA IN ONE PLACE

You have a lot of powerful data scattered throughout your Portfolio Management and other systems that only a few people can access. With PureWealth, that information is leveraged and organized for the benefit of all. Share your information with everyone in your organization and enhance efficiencies. Integrate client and relationship information with portfolio data from your back-office system. Quickly access detailed information using the powerful search interface.

PROVIDE FLEXIBLE AND RESPONSIVE CUSTOMER SERVICE

PureWealth provides a 360° view of clients that presents information from all perspectives, including accounts, clients, family households, and custom groups. Easily access all documents, contacts, and information related to a particular client or prospect including key centres of influence.

KEY BENEFITS

- Employ a 360° view of your clients and prospects
- Replace your existing CRM with a system that is designed specifically for the industry
- Save time while offering better customer service to your clients
- Interact more effectively with more clients in a single day
- Complete administrative tasks more easily and efficiently
- Access financial and client data from a single point of entry
- Sharpen your team's client management capabilities by equipping them with all the information they need

FEATURES

- Integrates with existing Portfolio Management and Custodial systems, e.g. Stat Pro, SS&C, MPower, Harmony, Unitrax, Viewfinder, ISM, FileCabinet
- Exports to commonly used programs such as Outlook, Word and Excel
- Groups financial information at any level
- Allows KYC (Know-Your-Client) information to be accessed from within PureWealth
- View asset allocation and performance results at any level
- Creates ad hoc reports for clients to show them where they stand at any point in time
- Creates benchmark exception reports

Armed with the powerful information that PureWealth consolidates for you, you will be better able to identify and respond to the unique needs of your clients and prospects.

GAIN GREATER INSIGHT INTO YOUR BUSINESS AND YOUR CLIENTS

PureWealth allows you to create and take advantage of a rich centralized repository of client data. Use this raw data to create custom reports without resorting to manual computation or manipulation. Our client reporting solution makes preparing top-quality consolidated client statements easier in many ways.

First, our automated solution generates better-looking reports. The look and feel of the document is your own and reflects your brand throughout. Second, you get more data in graphic layouts. Finally, you can consolidate information quickly – whether it's from your custodial or your back office system.

Our management reporting solution provides you with the kind of data you need to make key strategic decisions based on information such as your firm's total assets under management. This solution allows you to track business objectives and goals, get an accurate, timely view of business performance, and make smarter business decisions.

INTEGRATE CLIENTS' FINANCIAL DATA INTO YOUR CRM

PureWealth integrates fully with your existing Portfolio Management System. Key data related to accounts, security pricing, exchange rates, transactions, and much more is automatically synchronized with all major systems.

The PureWealth system integrates with popular office productivity products such as Microsoft Outlook, Microsoft Excel, and Microsoft Word. PureWealth also ensures you stay up to date by synchronizing your calendar on your mobile device or Blackberry® through Microsoft Exchange.

ABOUT PUREFACTS

PureFacts has a ten-year track record of successfully developing information management software to keep businesses responsive and nimble – both today and tomorrow.

We do much more than design and sell software. We bring CEOs and CIOs together through access to high quality, reliable and useful information on every aspect of operating and financial performance. When finance and information technology teams talk in terms both can understand, information quality improves – as does the ability to manage the enterprise.

This is where we come in. Not only will we help you build bridges within your business using collaborative tools everyone understands, but we'll also show you a healthy and consistent return on your investment.



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